

TO: James L. App, City Manager

FROM: Mike Compton, Director of Administrative Services

SUBJECT: North County Transit Study – Review Scope of Work

DATE: August 5, 2003

Needs:

For the City Council to review and comment on the proposed Scope of Work for a Request for Proposals to be distributed by San Luis Obispo Council of Governments (COG) for a North County Transit Study.

Facts:

1. As a result of the 2000 census, the Paso Robles, Atascadero and County area along the Highway 101 corridor including Templeton and Santa Margarita have been designated as an “urban area” (UA).
2. With this designation comes eligibility for Federal Transit Administration (FTA) 5307 funding, a new reoccurring source of transit funding.
3. Transit providers within this UA are eligible to apply for \$551,000 in FTA 5307 funding.
4. The COG requested a one time allocation of FTA 5307 funds to undertake a North County Transit Study. North county transit providers agreed to allocate \$80,000.
5. COG has developed a scope of work to be included in the request for proposals. A copy of the draft scope of work is attached.

Analysis
and
Conclusion:

Given the potential policy implications of the Study, it is desirable that the Council review the scope of work and provide feedback, if any, to COG. Within the Scope of Work, there appears to be a heavy emphasis on “consolidation”. There are both advantages and disadvantages to consolidation. However, Study findings may not support consolidation but the Council should be aware of the potential policy impacts upon local transit services. Such implications include but may not be limited to:

- a. Loss of direct local control on transit services within our community.
- b. Use of local transit funds, FTA 5307 and/or TDA, on transit services outside our community.
- c. Less funds available to maintain the streets and roads on which the community and transit system operate.

- d. Additional layer(s) of bureaucracy relating to local and regional transit matters.

On the other hand, some positive policy implications might include:

- a. Reduction in staff time allocated to transit system oversight.
- b. Improved transit operations (?).
- c. Elimination of service duplication.
- d. Improved service provider coordination

The scope of work has not been reviewed by the Council's Transit Advisory Committee since it does not meet again until September.

Fiscal
Impact:

No immediate fiscal impact. Potential long-term impacts are unknown and may vary widely depending upon Study findings.

Options:

- a. Provide feedback to COG relative to the Scope of Work for the North County Transit Study; or
- b. Amend, modify, or reject the above option.

SAN LUIS OBISPO COUNCIL OF GOVERNMENTS

STAFF REPORT

MEETING DATE:	August 6, 2003
SUBJECT:	North County Transit Study and Long Range Transit Plan Scopes-of-Work

SUMMARY

This staff report presents two "Scopes-of-Work" for transit studies to be included in a consultant's Request-for-Proposals:

- ❖ North County Area Transit Study, a North County urbanized area transit study (2004-2014) and
- ❖ Long Range Transit Plan (LRTP) Update to the 1996 LRTP (2004-2024).

The North County Area study examines new opportunities related to the new \$550K a year in Federal transit funding over the next ten years, and the LRTP will provide a region wide transit plan for the next twenty years. The LRTP will provide the basis for updating the Public Transportation Element of the next Regional Transportation Plan.

RECOMMENDATION

Staff: Ratify Scopes of Work (See Pages D-8-2 and D-8-4)

RTAC: Concur with staff as long as early public input is sought (before developing alternatives)

TTAC: Concur with staff

CTAC: Concur with staff; yet the work needs a more pro-active effort earlier on for adequate public input.

BACKGROUND

North County Transit Study – This study addresses transit in the Atascadero-Paso Robles, Santa Margarita-Templeton urbanized area. Technical Committee members represent the Cities of Paso Robles and Atascadero, the Regional Transit Authority (RTA), the County of San Luis Obispo, SLOCOG and Caltrans. SLOCOG will be the lead agency on the study. The work will be performed under an \$80,000 professional services contract to be awarded in the fall of 2003 with target completion of early November 2004.

The study objective is to identify candidate near-term and mid-term joint projects or activities for future funding cycles. A key component of the planning effort is to develop and compare several alternatives ranging from a "status quo" to partial coordination and onto full consolidation among local transit providers. The consultant will derive cost savings, operational efficiencies, ridership gains, plus identify benefits to the public and other positive impacts (example: service quality, service directness and public awareness). The overall goal is to optimize the use of the larger transit-funding base among all jurisdictions. In addition, the 5-year near-term elements of the study will provide an update to the City of Atascadero Short-Range Transit Plan, thus developing the plan in the North County area (rather than as a "stand alone" local effort).

In the review of the Scope of Work by RTAC and the NC Technical Committee, both Task 5 regarding consolidation & coordination, and the role of local input have been controversial. There is some resistance to examine consolidation, and much more willingness to look at coordination issues. The Scope of Work has been updated to increase local input and involvement.

Your Board approved the **Long Range Transit Plan** grant in the fall of 2001. Caltrans awarded the small urban/rural transit research grant (Section 5313(b)) to the region in the spring of 2003. The work will be performed under a \$35,000 professional services contract managed by SLOCOG with a target completion date of the summer 2004. For the mid term horizon the plan will incorporate recommendations from the South County Area Transit Short-Range Transit Plan Update (now underway), the City of San Luis Obispo Short-Range Transit Plan (nearing completion) and findings from the North County Area Transit Study.

Staff report prepared by Eliane Guillot

Scope-of-Work

North County Area Transit Study

Study Purpose(s):

- A. Identify opportunities and constraints for better coordination of public transportation in the North County urbanized area by streamlining transit services for greater public convenience, increased awareness and participation (2-10 years).
- B. Meet the Short-Range (5-year) Transit Plan needs for Atascadero Transit.

Task One: Inventory all Existing Transit Services in the North County:

1. Summarize current transit operating environment: fixed-route maps, dial-a-ride service coverage, fares, hours/days of service, transfer rules.
2. List capital assets and facilities: fleet, bus stops, transit center, park and ride lots, dispatch center, maintenance sites, passenger information centers etc. (by operator)
3. Highlight recent or pending changes: PRCATS S RTP update (2001); Atascadero triennial audit follow up actions (2002); Templeton Taxi ridership growth, and RTA Route 9 proposed modifications (Cuesta Grade transition and post-winter 2003)
4. Show ridership trends (past 5 years) and near term budget projections by transit system and overall.
5. Map major trip generators in each city/community and how they are served by current services: frequency, local connections to major origins and destinations (in local or adjacent community); regional connectivity (SLO City area and beyond).
6. Identify the origin and destination of RTA Route 9 passengers through compilation of existing surveys and/or additional analysis.
7. Current and near-term projections for each system's actual costs and budgets by function (by operator)
8. Current performance tools and multi-year statistics on each system's cost-effectiveness, ridership productivity and other relevant annual indicators

This task will also inventory other transportation options, which may complement or duplicate some of the above transit elements. Examples might be Ride-On Transportation senior shuttles, other programs of the Consolidated Transportation Services Agency, any separate social services transportation (funded by non-transit sources), plus seasonal tourist-oriented services (County fair and airport shuttles, charters, taxis, limousines etc...). The four transit operators and Regional Rideshare will supply the most up-to-date information in electronic format; to reduce the consultants time in analyzing and summarizing the status quo for input to Tasks 2 and 3.

Product: Comprehensive *Working Paper #1* on existing systems and other options available to the public.

Task Two: Identify barriers, if any, to ridership growth

Given below are examples of potential barriers to the general public:

1. Differences in fare structures between systems
2. Varying service spans among providers
3. Lack of public outlets in North County with information on all transit options
4. Differing hours, days, type and/or levels of services
5. Service directness by travel direction or time-of-day (transfer-related barriers)
6. Inter-city or inter-community links (two-way links) within North County
7. Links to un-served outer areas (Shandon, San Simeon, Creston etc...)
8. Marketing and public outreach (transit identity to the general public)
9. Other aspects as identified by the working group or generated by public input

Besides grouping all the above (or identifying other categories), the consultant will interview the transit providers (including drivers) and users of current transit systems. This will also encompass reviewing results from on board surveys (previously conducted by providers) and the outcome of unmet transit needs' operational requests (received

from North County residents in recent years). Summarize issues in an easy-to-understand format for use in public presentations (Use of maps and graphics recommended over text format) and input to the next task.

Product: A listing of needs or shortcomings in current services

Task Three: Explore opportunities for greater efficiencies (higher ridership and cost-effectiveness) via combined efforts among providers:

1. Through team-building with North County Technical Transit Committee, and interviews with decision-makers, define the future direction(s) of transit in North County.
2. Facilitate transition from individual planning cycles and objectives (i.e. focusing on each jurisdiction) onto a more unified area-wide approach.
3. Assist in identifying opportunities for joint projects (as a way to address Task 2 issues).
4. Evaluate the pros and cons of consolidated marketing, administration, decision-making and other aspects as appropriate.

Product: A list of recommended improvement strategies to the 2014 horizon.

Task Four: Prepare short-term improvement list - (2004 to 2009):

Assemble a “wish list” of candidate near-term improvements (from each agency) grouped by category (operating, maintenance, capital, customer relations, shared passenger amenities, marketing, planning, training, etc...). Include relevant criteria to perform an area-wide cost-effectiveness review of means to achieve savings/economies-of-scale among operators: simulate phased approach toward sharing of specific functions (such as merging small operating contracts, sharing of fleets or facilities, joint procurements etc...)

Product: A consolidated improvement list. Document all of the above findings (Tasks 2, 3 and 4 combined) in *Working Paper #2*.

Task Five: Assess integration alternatives and evaluate scenarios:

Consider several approaches, including at a minimum:

- a) Alternative A - “**Status Quo**”: with currently adopted plans or Short-Range Transit Plan updates with separate systems. This will primarily serve as the “Baseline” scenario for comparing other options.
- b) Alternative B “**Limited Integration**”: Merge applicable functions and define intermediate steps to deliver area-wide services via coordination among local providers as deemed feasible. This scenario may consist of several sub-alternatives.
- c) Alternative C “**Consolidate all Local Transit Services**”: This scenario would fully integrate local North County Area transit services between Santa Margarita and Paso Robles.

Project ridership levels; forecast costs and revenues for each alternative; compare ridership productivity, cost efficiency and cost-effectiveness performance of the alternative relative to the Baseline projections. Identify funding sources by project type and lay out possible implementation schedule. This task will include local public involvement activities to gather input from current users and local residents, students and workers.

Product: Comparison of North County Area transit alternatives (*Working Paper #3*).

Task Six: Prepare recommendations for system changes, if any:

1. Recommend near-term programming elements: scope, budget and implementation schedule for next two funding cycles and mid-term horizon (per Task 4 findings as refined under Task 5)
2. List outstanding issues and recommend follow up efforts by the region, North County as a whole or individual agencies (to ensure continuity between the near-term and the mid-term direction)

Product: *Final Study report* with Executive Summary and Chapters based on three Working Papers